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Potential grants for special local land



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**POTENTIAL GRANTS FOR SPECIAL
LOCAL LAND USE PLANNING PROJECTS**

FROM PRIVATE FOUNDATIONS

STATE DOCUMENTS COLLECTION

1993

MONTANA STATE LIBRARY
1015 N. 6TH AVE.
HELENA, MONTANA 59620

BY

**THE MONTANA DEPARTMENT OF COMMERCE
COMMUNITY TECHNICAL ASSISTANCE PROGRAM**

HELENA, MONTANA

JULY 1991

PLEASE RETURN

DEPARTMENT OF COMMERCE
LOCAL GOVERNMENT ASSISTANCE DIVISION



STAN STEPHENS, GOVERNOR

COGSWELL BUILDING — ROOM C 211
CAPITOL STATION

STATE OF MONTANA

(406) 444-3757

HELENA, MONTANA 59620-0522

To: Montana Planning Boards and Staff

From: Robb Mc Cracken and Gavin Anderson

RMc gA

Date: 7/15/91

Re: Potential Grants For Special Local Planning Projects From Private Foundations

Background

Upon request of planning staff from several local governments in Montana, we conducted preliminary research into whether or not private foundation grants could be a possible "new" source of funding for local planning activities. As you may be aware, due to a lack of tax revenue, several Montana planning offices have been eliminated and many others have had to reduce staff and services to the public. In the Fall of 1989, we had a planning intern conduct a telephone survey of several foundations that we had previously studied and identified as being potentially receptive to proposals for community and environmental planning grants.

Enclosed is a brief summary of those foundations that told us they would consider making grants for local planning projects in Montana. Also enclosed is a copy of a telephone survey form that was used to prepare the summary, so you can see the type of questions we asked of the foundations. This information may help you secure foundation funding for a special local planning project.

Caveats

Although our planning intern did check out the foundations, there are several limitations and things you should keep in mind in using the enclosed information.

1. Most private foundations will not fund what they consider to be ongoing or routine planning activities. Therefore, one strategy to overcome this barrier is to develop a "special or unique" project. A second strategy is to describe your "routine" project in exiting and dramatic terms, concentrating on the problems the grant would solve, the benefits of the project, and the results. Exciting projects get foundation grants.
2. Some foundations will not make grants to governmental agencies. The reason for this policy is typically because some foundations think that tax supported agencies can "always" raise funds using taxation. Apparently, the foundations have not come to grips with I-105. Therefore, one strategy to overcome this barrier is to create or use a "conduit organization" that is eligible to receive foundation funding. Typically the conduit will need to

be a 501(c)(3) non profit corporation. The conduit organization and the local government planning office can work closely together to carry out the project.

3. Foundations may change their funding policies without warning or notifying interested applicants. Foundations are not like governmental grant/loan programs that operate under laws and regulations and are subject to legislative oversight and public participation requirements. Foundations make policy changes quietly, often secretly, at the initiative of the board of directors. Moreover, foundations may deviate from their written policies if a proposed project has a strong support from the individuals on the board. Foundations sometimes change the rules for applicants in the "middle" of the proposal ranking process. The enclosed information was accurate at the time that it was collected but it may have been modified by the foundation without our knowledge.
4. Many foundations have a "hidden" preference for funding statewide or regional (multi-state) projects. This preference normally places a grant application from a single local government at a disadvantage. One strategy to overcome this potential obstacle is to include in your project evidence that the project addresses a statewide problem. The grant, besides helping your local government, would be used to produce a demonstration project and model that could be used to solve similar problems statewide or in a multi-state area.
5. To enhance the potential for success, you will probably need a carefully researched and crafted grant proposal. For example, experts recommend, prior to asking a foundation officer about your project over the phone, that you carefully study the application forms and the foundation's annual reports for the last three years. This allows you to "slant" the basic thrust of your phone inquiry (first impressions count). Depending on the preliminary feedback over the phone, you can further slant your final written proposal to enhance the potential for award of a grant. In addition, the proposal may have to include some of the aforementioned strategies.
6. The enclosed information does not include purely local or "community" foundations because planners statewide would not benefit from this information. You may want to find out if there is a community foundation that serves your area. An example is the Sample Foundation which serves Yellowstone County.

Feedback

We would like to hear from you regarding your experiences with foundation funding. What type of planning project did you propose to the foundation? What was the foundation's response? Were you able to successfully develop an arrangement with a conduit organization to overcome an eligibility problem? Were you able to get any foundation grant awards? Do you have enough time to apply for foundation grants? Information from you will help us target future research into new methods to fund local planning projects.

Enclosures

OFSN FORM FOR LAND USE PLANNING GRANTS

DEPARTMENT OF COMMERCE
March 1991

INDEX #: _____

CATEGORY: _____

PROGRAM OPTION: ARCO FOUNDATION

TYPE: STATE FEDERAL LOCAL PRIVATE X

CONTACT: CONNIE CROWLEY

AGENCY: ARCO FOUNDATION

AGENCY ADDRESS: 555 17TH STREET, SUITE 3605
DENVER, CO. 80202

PHONE NO.: (303)293-4195

TYPE OF ASSISTANCE: GRANTS X LOANS TAX OTHER

ELIGIBLE APPLICANTS: 501(C)(3) ;509 (A)(Z)

ELIGIBLE PROJECTS: COMMUNITY PROGRAMS - ECONOMIC DEVELOPMENT;

ENVIRONMENTAL PROGRAMS - EDUCATION, CONSERVATION POLICY

FUNDING NOTE: ARCO HAS FACILITIES IN BUTTE AREA

INDEX #: _____

CATEGORY: _____

PROGRAM OPTION: CHAMPION INTERNATIONAL CORPORATION

TYPE: STATE FEDERAL LOCAL PRIVATE X

CONTACT: MORIS VANASSE

AGENCY: CHAMPION INTERNATIONAL

AGENCY ADDRESS: 1 CHAMPION PLAZA
STAMFORD, CT. 06921

PHONE NO. (203) 358-7000 OR (203) 358-7361

TYPE OF ASSISTANCE: GRANTS LOANS TAX OTHER

ELIGIBLE APPLICANTS: 501(C)(3); NO GOVERNMENT

ELIGIBLE PROJECTS: FOREST MANAGEMENT, PUBLIC EDUCATION,
PROGRAMS DEDICATED TO NATURAL RESOURCES, WILDLIFE, AND PUBLIC
EDUCATION ON ENVIRONMENTAL ISSUES

FUNDING NOTE: CHAMPION HAS FACILITIES IN MISSOULA AND LIBBY

INDEX #:

CATEGORY:

PROGRAM OPTION: EXXON CORPORATION

TYPE: STATE FEDERAL LOCAL PRIVATE X

CONTACT: A.R. RANDOL

AGENCY: EXXON CORPORATION

AGENCY ADDRESS: 800 BELL
HOUSTON, TX 77001

PHONE NO.: (713) 656-9199

TYPE OF ASSISTANCE: GRANTS X LOANS TAX OTHER

ELIGIBLE APPLICANTS: CHARITABLE NON-PROFIT ORGANIZATIONS IN
BILLINGS

ELIGIBLE PROJECTS: WILDERNESS, LIMITED URBAN PLANNING, WILDLIFE
HABITAT.

FUNDING NOTE: EXXON HAS FACILITIES IN BILLINGS.

INDEX #: _____

CATEGORY: _____

PROGRAM OPTION: FORD FOUNDATION

TYPE: STATE FEDERAL LOCAL PRIVATE X

CONTACT: FRANKLIN A. THOMAS

AGENCY: FORD FOUNDATION

AGENCY ADDRESS: 320 EAST 43 STREET, NEW YORK, NY 10017

PHONE NO.: (212)513-5000

TYPE OF ASSISTANCE: GRANTS X LOANS TAX OTHER

ELIGIBLE APPLICANTS: CHARITABLE, EDUCATIONAL OR SCIENTIFIC AS

DEFINED BY IRS, LOCAL GOVERNMENTS.

ELIGIBLE PROJECTS: THAT HELP DEVELOP RURAL POLICIES,

IMPROVE NATURAL RESOURCE MANAGEMENT AND CREATE INCOME AND

ECONOMIC OPPORTUNITIES FOR RURAL POOR.

FUNDING NOTE: SUBMIT LETTER OF INQUIRY

INDEX #: _____

CATEGORY: _____

PROGRAM OPTION: W. ALTON JONES FOUNDATION

TYPE: STATE FEDERAL LOCAL PRIVATE X

CONTACT: DAVID SPEEDIE

AGENCY: ARCO FOUNDATION

AGENCY ADDRESS: 232 E. HIGH STREET

CHARLOTTESVILLE, VA 22901

PHONE NO.: (804) 295-2134

TYPE OF ASSISTANCE: GRANTS X LOANS TAX OTHER

ELIGIBLE APPLICANTS: 501(C) (3); LOCAL GOVERNMENT

ELIGIBLE PROJECTS: DIRECT RELATION TO POLLUTION/TOXIC PROBLEM

(INCLUDES GROUNDWATER); EMPHASIS ON PRIVATES

FUNDING NOTE: _____

INDEX #: _____

CATEGORY: _____

PROGRAM OPTION: JESSE SMITH NOYES FOUNDATION

TYPE: STATE FEDERAL LOCAL PRIVATE X

CONTACT: STEPHEN VIEDERMAN, PRESIDENT

AGENCY: JESSE SMITH NOYES FOUNDATION

AGENCY ADDRESS: 16 EAST 34TH STREET

NEW YORK, NY 10016

PHONE NO.: (212) 684-6577

TYPE OF ASSISTANCE: GRANTS X LOANS TAX OTHER

ELIGIBLE APPLICANTS: 501 (C) (3) ORGANIZATIONS

ELIGIBLE PROJECTS: WATER RESOURCES; SUSTAINABLE AGRICULTURE

FUNDING NOTE: SUBMIT BRIEF LETTER OF INQUIRY

INDEX #: _____

CATEGORY: _____

PROGRAM OPTION: THE KRESGE FOUNDATION

TYPE: STATE FEDERAL LOCAL PRIVATE X

CONTACT: SANDRA AMBROZY

AGENCY: THE KRESGE FOUNDATION

AGENCY ADDRESS: P.O. BOX 3151

TROY, MI 48007

PHONE NO.: (313) 643-9630

TYPE OF ASSISTANCE: GRANTS X LOANS TAX OTHER

ELIGIBLE APPLICANTS: NONPROFITS, MUNICIPALITIES, COUNTIES SEEKING
CONSTRUCTION OR REHABILITATION OF FACILITY.

ELIGIBLE PROJECTS: FUND ONLY CAPITAL PROJECTS IN RELATION TO

LAND USE PLANNING, LARGE BUILDINGS (\$100,000 PROJECTS, PER

8/90

FUNDING NOTE: INITIAL PRIVATE FUNDS NEED TO BE IN PLACE, BUT NO
FORMULA OR MATCH REQUIRED.

INDEX: _____

CATEGORY: _____

PROGRAM OPTION: THE RUTH MOTT FOUNDATION

TYPE: STATE FEDERAL LOCAL PRIVATE X

CONTACT: DEBORAH TUCK, EXECUTIVE DIRECTOR

AGENCY: RUTH MOTT FOUNDATION

AGENCY ADDRESS: 1726 GENESEE TOWERS

 FLINT, MI 48502

PHONE NO.: (313) 232-3180

TYPE OF ASSISTANCE: GRANTS X LOANS TAX OTHER

ELIGIBLE APPLICANTS: CHARITABLE ORGANIZATIONS IN U.S.

ELIGIBLE PROJECTS: EMPHASIS ON FARM DEMONSTRATION PROJECTS AND

PUBLIC EDUCATION EFFORTS THAT HAVE POTENTIAL OF IMPROVING

PUBLIC UNDERSTANDING AND PUBLIC POLICIES MORE SUPPORTIVE OF

SUSTAINABLE AGRICULTURE, PRESERVATION OF GENETIC DIVERSITY IN

AGRICULTURE

FUNDING NOTE: DEADLINES: 11-7, 3-15, 7-15

INDEX #: _____

CATEGORY: _____

PROGRAM OPTION: THE NEW LAND FOUNDATION, INC.

TYPE: STATE FEDERAL LOCAL PRIVATE X

CONTACT: ROBERT WOLF

AGENCY: THE NEW LAND FOUNDATION, INC.

AGENCY ADDRESS: 200 PARK AVENUE, SUITE 3014

 NEW YORK, NY 10166

PHONE NO.: (202) 785-9577

TYPE OF ASSISTANCE: GRANTS X LOANS TAX OTHER
ELIGIBLE APPLICANTS: ALL LAND USE PLANNING PROJECTS
ELIGIBLE PROJECTS: 501 (C) (3); LOCAL GOVERNMENTS
FUNDING NOTE: DEADLINES: AUGUST 1, FEBRUARY 1

INDEX #: _____
CATEGORY: _____
PROGRAM OPTION: NEEDMORE FUND
TYPE: STATE _____ FEDERAL _____ LOCAL _____ PRIVATE _____
CONTACT: DINNY STRANAHAN
AGENCY: NEEDMORE FUND
AGENCY ADDRESS: 1730 15TH STREET
BOULDER, CO 80302
PHONE NO.: (303) 449-5801

TYPE OF ASSISTANCE: GRANTS X LOANS TAX OTHER
ELIGIBLE APPLICANTS: LOCAL GOVERNMENTS, (OUT OF STATE, BUT
POSSIBLY OTHERS) LOCAL COMMUNITY GROUPS; 501 (C) (3)
ELIGIBLE PROJECTS: RURAL LAND-USE, COMMUNITY DEVELOPMENT
FUNDING NOTE: DEADLINES: JANUARY 10, JULY 10.

INDEX #: _____

CATEGORY: _____

PROGRAM OPTION: NORTHWEST AREA FOUNDATION

TYPE: STATE _____ FEDERAL _____ LOCAL _____ PRIVATE X

CONTACT: BOBBIE HENRIE, SENIOR PROGRAM OFFICER

AGENCY: NORTHWEST AREA FOUNDATION

AGENCY ADDRESS: WEST 975 1ST NATIONAL BANK

ST. PAUL, MN 55101

PHONE NO.: (612) 224-9635

TYPE OF ASSISTANCE: GRANTS X LOANS TAX OTHER

ELIGIBLE APPLICANTS: NONPROFITS; NO GOVERNMENT.

ELIGIBLE PROJECTS: CONFLICT RESOLUTION OF MANAGEMENT AND USE

OF NATURAL RESOURCES

FUNDING NOTE: CALL FIRST OR MAIL 2 PAGE LETTER OF INQUIRY.

INDEX #: _____

CATEGORY: _____

PROGRAM OPTION: THE SHALAN FOUNDATION

TYPE: STATE _____ FEDERAL _____ LOCAL _____ PRIVATE _____

CONTACT: CATHARINE LERZA

AGENCY: THE SHALAN FOUNDATION

AGENCY ADDRESS: 10 LOMBARD STREET, SUITE 250

SAN FRANCISCO, CA 94111

PHONE NO.: (415) 433-4545

TYPE OF ASSISTANCE GRANTS X LOANS TAX OTHER

ELIGIBLE APPLICANTS: NON-PROFIT ORGANIZATIONS, NO LOCAL
GOVERNMENTS

ELIGIBLE PROJECTS: ECONOMIC AND INDUSTRIAL PLANNING AND GROWTH,
INCLUDING POLICY ISSUES RELATED TO EMPLOYMENT AND INVESTMENT;
RESOURCE MANAGEMENT

FUNDING NOTE:: APPLICATIONS DUE MARCH 1 AND JULY 15.

INDEX # _____

CATEGORY: _____

PROGRAM OPTION: NATIONAL ENDOWMENT FOR THE ARTS

TYPE: STATE FEDERAL X LOCAL PRIVATE

CONTACT: _____

AGENCY: NATIONAL ENDOWMENT FOR THE ARTS, DESIGN ARTS PROGRAM

AGENCY ADDRESS: ROOM 625, 1100 PENNSYLVANIA AVENUE N.W.

WASHINGTON, D.C. 20506

PHONE NO. (202) 682-5437

TYPE OF ASSISTANCE: GRANTS X LOANS _____ TAX _____ OTHER _____

ELIGIBLE APPLICANTS: STATE OR LOCAL GOVERNMENTS, COMMUNITY OR

NEIGHBORHOOD ORGANIZATIONS, COLLEGES OR UNIVERSITIES, AND

INDEPENDENT NONPROFIT GROUPS OR INSTITUTIONS IN COMMUNITIES OF

50,000 OR LESS OUTSIDE MAJOR METROPOLITAN AREAS.

ELIGIBLE PROJECTS: CREATING A DESIGN FOR A PUBLIC FACILITY,

GRAPHICS CONSULTING FOR STREET SIGNS, STUDYING THE FEASIBILITY

OF A PROPOSED ZONING PLAN, LANDSCAPE PLANS FOR PUBLIC

PLAYGROUNDS OR PARKS, CONDUCTING DESIGN WORKSHOPS FOR LOCAL
OFFICIALS AND RESIDENTS.

FUNDING NOTE: GRANTS OF \$5,000 - \$10,000. AT LEAST A ONE-TO-ONE
MATCH REQUIRED. APPLICATION POSTMARK DEADLINES: JUNE 21, 1991
FOR NOVEMBER 1991 AWARDS, AND DECEMBER 13, 1991 FOR MAY 1992
AWARDS.

landusegrants.peggy

PHONE SURVEY

Hello, my name is Dawn Myrvik and I am calling from the Montana Department of Commerce.

May I take a few minutes of your time to conduct a short telephone survey of your foundations's grant program?

On the recommendation of the Governor and the private sector, we have developed a computer database that allows us to link local organizations and local governments that need financial help, with foundations and agencies that provide grants, loans, and other types of funding. The Database is very important because there are billions of dollars in needs identified, yet very few funding sources in Montana. The Database cuts red tape and makes local projects possible by identifying foundations that fund land use planning projects in Montana.

Does your foundation make grants for land use planning projects in Montana?

Do you fund land use planning activities in any of these 4 categories:

I. Conservation Planning Projects

For example:

1. An agriculture preservation plan for Flathead County, Mt. to find out how to save irreplaceable agricultural land from being developed for commercial uses. The goals of the project are to protect agriculture and preserve aesthetics and to establish a program to protect key agriculture parcels.

Another example of Conservation planning projects is the:

1. Lake protection plan for Lake County, Mt. It's goal is to examine alternative methods to protect water quality, recreation, public access, and aesthetics of lakes where major land developments are proposed. Also, to establish new incentives, regulations, or other methods to preserve lakes and prevent development-related problems.

Do you fund Development planning projects? Read examples.

II. Development Planning Projects

For example:

1. Creating an economic development program with the goal of creating badly needed new jobs for the City of Glendive. The project would involve all "players" in economic development (government, chamber of commerce, business groups, bankers, etc.).

Another example of a development planning project would be:

2. Creating a land developer's training program in order to train developers, subdividers, business persons and land owners how to develop property in a legally, profitably, and environmentally sound manner. Project to be located in Missoula and run by University of Montana, City

of Missoula, Missoula County and Mt. Association of Planners.

Do you fund Land Use Regulation Planning Projects? Read examples.

III. Land Use Regulation Planning Projects

For example:

1. Providing a trained professional planning consultant to help City of Thompson Falls and Chamber of Commerce to improve the Thompson Falls zoning ordinance. Goals of this project are to better protect the constitutional rights of property owners, protect historical buildings on main street, and stimulate economic development. Thompson Falls does not have any professional paid planning staff - only volunteers who lack the skills to do this work.

Do you fund Comprehensive plans? Read examples.

IV. Comprehensive Plans?

For example:

1. Assisting Teton County and Lewis and Clark County to revise their county comprehensive plans to deal with potential land use conflicts resulting from oil well development in the pristine wilderness and ranchlands along the Rocky Mountain Front. Holding public meetings to clarify issues and potential problems, conducting research, and amending comprehensive plans to make necessary changes to prevent problems.

CFILE: phonesurvey

